LEO BURNETT CO.

Clients:	The Americas: USA	Canada	Argentina	Brazil	Chile	Colombia	Costa Rica	Dom. Republic	Guatemala	Mexico	Peru	Puerto Rico	Venezuela	Europe: Belgium	Denmark	France	Germany	Greece	Italy	Netherlands	Norway*	Spain	Switzerland	Turkey	U.K.	Middle East: Bahrain	Egypt	Kuwait	Lebanon	Saudi Arabia	U.A.E.	Pacific: Australia	Hong Kong	India*	Indonesia*	Japan	Malaysia	New Zealand	Philippines	Singapore	South Korea*	Taiwan	Thailand
United Airlines	●									●															●							●	●				●	●	●	●			●	●
United Distillers	●												●			●	●	●	●				●			●				●			●	●			●		●	●	●			●

*Non-equity affiliation Source: Leo Burnett Co

(Continued from Page 78)

Burnett won 233 assignments in 42 countries, including Beiersdorf in six countries. Accounts lost included Hewlett-Packard in three. □

D'ARCY MASIUS BENTON & BOWLES

Clients:	The Americas: USA	Canada	Argentina	Brazil*	Colombia*	Mexico	Peru*	Puerto Rico*	Venezuela	Europe: Austria	Belgium	Denmark	Finland	France	Germany	Greece	Ireland	Italy	Netherlands	Norway	Portugal	Spain	Sweden	Switzerland	U.K.	Saudi Arabia	South Africa*	Pacific: Australia	Hong Kong	India*	Indonesia	Japan	Malaysia*	New Zealand	Philippines*	Singapore	South Korea*	Thailand
American Home Products	●					●												●				●			●															
Anheuser-Busch	●	●																							●				●						●				
Bahamas Min. Tourism	●														●	●									●						●								
BASF										●					●	●		●																						
Bayer	●	●								●	●			●	●	●	●	●	●			●			●						●	●		●					
Boehringer Ingelheim*															●							●			●							●							
Boots											●														●					●			●						
Bristol-Myers	●																											●	●			●	●					
Ciba-Geigy	●	●													●			●							●			●	●										
Coopers & Lybrand	●												●				●		●														●						
CPC International	●					●									●			●																					
Digital Equipment										●			●	●	●	●		●	●	●	●				●		●												
Dow Chemical	●	●													●							●			●			●	●			●							
Fiat										●	●	●				●		●				●		●			●												
FTD/Interflora	●	●																							●			●											
General Motors	●								●																		●	●											
Glaxo															●										●				●		●				●				
Grand Metropolitan	●												●						●		■				●				●							●			
H.J. Heinz	●											●																	●							●			
Hoechst A.G.							●					●			●			●							●						●					●			
Honda Motor Co.				●								●						●				●									●								
Kimberly-Clark												●				●						●																	
Mars Inc.	●	●				●		●		●	●	●	●	●	●	●		●	●			●	●		●			●	●			●							
Mars Petcare		●						●		●	●	●	●	●	●			●	●			●	●		●			●	●			●							
Mobil Corp.	●				●																						●	●						●				
Nobel Industries										●	●	●	●	●	●			●	●			●	●																
Nokia										●		●	●	●	●			●				●	●	●	●														
Pernod	●										●	●		●	●				●					●	●				●	●			●						
Pfizer Inc.	●														●										●				●	●			●						
N.V. Philips	●	●	●								●	●		●	●				●	●				●	●				●	●	●			●					
Procter & Gamble	●	●				●				●	●			●	●	●	●	●				●	●		●				●	●		●	●	●	●	●	●	●	●
Rhone-Poulenc			●												●							●			●				●										
Richardson-Vicks	●	●				●				●		●	●	●	●	●	●	●	●			●	●	●	●				●	●		●	●		●				
Texaco				●							●				●				●						●														
Thailand Tourist Bd.															●			●											●	●							●		
United Distillers											●	●		●	●		●			●	●		●						●				●						

*Non-equity affiliation Source: D'Arcy Masius Benton & Bowles

D'Arcy Masius Benton & Bowles

D'Arcy Masius Benton & Bowles, New York, had 1988 non-U.S. gross income of $219.1 million, up 25.6%, and non-U.S. billings of $1.6 billion, up 34.8%.

Worldwide gross income reached $428.7 million, up 15.5%, while worldwide billings were $3.4 billion, up 23.2%.

The agency has majority interest in 43 foreign agencies, minority interest in four and non-equity affiliations with 27. D'Arcy has offices in 29 countries, including the U.S.

Foreign accounts added since Dec. 31, 1987, include Richardson-Vicks (Austria, Denmark, West Germany, Greece, Hong Kong, India, Ireland, Italy, Japan, Norway, Philippines, Switzerland); Procter & Gamble (Austria, India, Ireland, South Korea, Malaysia, Philippines, Spain, Switzerland); Philips (Argentina, Canada, France, Germany, Norway, Sweden, Australia, New Zealand, Singapore); Nokia (Austria, Denmark, Finland, France, Germany, Italy, Norway, Spain, Sweden, Switzerland, U.K.); Texaco (Belgium, Brazil, Germany, the Netherlands, U.K.).

Accounts lost included Bristol-Myers (Canada, the Netherlands, Indonesia); Europcar (Belgium, France, Germany, Switzerland, U.K.); Exxon (Argentina, Tokyo); Kimberly-Clark (Switzerland). □

FCB-PUBLICIS

Clients:	The Americas: USA	Canada	Bermuda	Brazil	Chile*	Colombia	Costa Rica	Dom. Republic	Ecuador	Guatemala	Jamaica	Mexico*	Panama*	Puerto Rico	Trinidad	Venezuela	Europe: Austria	Belgium	Denmark	Finland*	France	Germany	Greece	Ireland*	Italy	Netherlands	Norway	Portugal	Spain	Sweden	Switzerland	Turkey	U.K.	South Africa	Pacific: Australia	Hong Kong	India*	Indonesia*	Japan	Malaysia	New Zealand	Philippines	Singapore*	South Korea*	Taiwan	Thailand
Air France																		●	●		●	●					●			●															
Bermuda Dept. of Tourism	●	●	●																													●													
Boursin																		●			●				●					●	●	●												
Cadbury-Schweppes	●													●				●	●		●	●			●	●	●	●	●	●	●	●	●												
California Raisin Adv. Board	●	●																●				●										●												
Campbell Soup	●										●											●																						
Citicorp (Citibank/Diners Club)	●			●	●					●	●	●				●						●								●	●												
Colgate-Palmolive	●	●		●		●	●	●	●	●	●	●	●	●	●	●						●									●			●										
Data General	●															●																													
Dim																		●	●			●	●			●	●			●	●	●	●											
French Govt. Tourism	●	●																				●										●												
Garnier																		●				●	●			●	●			●	●	●												
Garuda indonesia Airlines	●																					●										●			●	●		●		●		●		
Grand Metropolitan (Pearle)	●	●												●								●										●												
Hiram Walker	●	●									●							●	●			●				●				●	●		●			●								
ICI																						●				●				●			●											
S.C. Johnson & Son	●	●					●											●	●			●	●			●				●	●	●											
Kimberly-Clark	●	●		●		●												●	■			●	●			●				●		●				●							
Lancome	●																	●	●			●	●			●				●	●	●												
L'Oreal	●	●										●				●		●	●			●	●			●				●	●	●												
Mazda	●	●											●																			●				●								
Nestle	●	●						●	●						●	●		●	●			●				●				●	●													
PepsiCo	●	●							●																																			
Philips/Whirlpool					●									●				●	●		●	●	●	●	●	●	●	●	●	●	●	●												
Renault																		●	●							●				●	●	●												
RJR/Nabisco	●		●			●		●		●								●	●			●				●				●														
Zenith	●	●																●				●	●			●	●			●	●													

*Non-equity affiliation Source: FCB-Publicis

FCB-Publicis

FCB-Publicis, an alliance formed in 1988 between Foote, Cone & Belding Communications, Chicago, and Publicis, Paris, had combined non-U.S. gross income of $379.6 million, up 37.6% from their combined figures for a year earlier. Non-U.S. billings were up 37.6% to $2.5 billion.

Worldwide gross income hit $653.3 million and worldwide billings reached $4.3 billion, both up 26%.

The network consists of 145 offices in 39 countries outside the U.S.

Major international accounts gained by FCB-Publicis included S.C. Johnson (Italy, West Germany, France); Beecham (Germany); Ballantine's (Paris); Cadbury Schweppes (Spain, Sweden); Duracell (Denmark) ; Kimberly-Clark (U.K., Colombia); Fujitsu (U.K.); RJR Nabisco (West Germany, Spain, Italy); Nestle (Thailand); 7-Eleven (Hong Kong); Philips/Whirlpool (U.K.); Guinness (U.K.).

Accounts lost included Gillette (U.K.); Diners Club (U.K.); Beiersdorf (Switzerland). □

GREY ADVERTISING

Clients:	The Americas: USA	Canada	Argentina	Barbados*	Brazil*	Chile	Colombia*	Jamaica*	Mexico	Peru	Puerto Rico	Uruguay	Venezuela	Europe: Austria	Belgium	Denmark	Finland	France	Germany	Italy	Netherlands	Norway	Spain	Sweden	Switzerland	Turkey*	U.K.	Israel*	South Africa	Pacific: Australia	Hong Kong	India	Japan	Malaysia	New Zealand	Philippines	Singapore	South Korea*	Taiwan	Thailand
Armor-All																			●														●					●	●		
BankAmerica	●									●			●						●		●		●		●		●				●							●	●		●	

Grey Advertising

Grey Advertising, New York, had non-U.S. gross

(Continued on Page 82)

That's the household income of an average USA TODAY International reader — an educated, affluent consumer with International tastes and Domestic ties.

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SOURCE: 1989 Readership Survey by Marketing Projects Group

USA TODAY

GREY ADVERTISING

Clients:	The Americas: USA	Canada	Argentina	Barbados*	Brazil*	Chile	Colombia*	Jamaica*	Mexico	Peru	Puerto Rico	Uruguay	Venezuela	Europe: Austria	Belgium	Denmark	Finland	France	Germany	Italy	Netherlands	Norway	Spain	Sweden	Switzerland	Turkey	U.K.	Israel*	South Africa	Pacific: Australia	Hong Kong	India	Japan	Malaysia	New Zealand	Philippines	Singapore	South Korea*	Taiwan	Thailand
BAT					●								●					●	●								●		●										●		
Bayer														●	●			●	●			●		●	●		●					●									
Beecham	●	●			●	●			●		●		●		●	●		●	●			●	●	●		●	●		●		●	●					●			●	
Block	●	●			●				●					●	●	●		●	●		●			●	●		●		●	●	●		●	●		●	●		●		●
Boehringer-Ingelheim	●	●			●														●	●																				●
Boots																					●						●			●		●									
Bristol-Myers	●								●		●								●										●				●			●					
Canon	●	■																●				●							●	●						●	●				
Ciba-Geigy	●											●												●			●														
Clairol	●				●				●		●																		●										●		
Corning	●								●						●			●	●	●			●	●			●			●		●		●		●				●	
Hallmark																			●				●							●			●								
Hertz																●			●								●	●													
IBM	●														●													●	●												
Johnson & Johnson	●											●																	●	●											
Kenner Prods.	●														●				●	●		●		●			●														
Kraft General Foods	●	■			●	●					●								●								●	●	●			●							●		
Mars	●													●	●				●	●	●	●		●			●			●											
Melitta														●	●	●	●	●	●		●				●	●															
Mitsubishi	●	■					●																							●				●		●				
Nike															●				●	●					●		●				●									
Northwest Airlines																●			●		●	●			●															
Philips					●																							●									●			
Pioneer																●	●		●	●		●			●															
Playtex	●	●																	●		●									●										
Procter & Gamble	●	●		●	●	●	●	●	●	●	●		●	●	●	●	●	●	●				●	■	●	●	●				●								●	
Reckitt & Colman			●																											●				●						
Remington	●	●				●													●	●						●					●	●		●		●				
Revlon									●										●								●												●	
Rothmans																											●				●	●		●	●				●	
Samsonite															●				●	●		●					●													
San Serif Marketing															●				●	●	●																			
G.D. Searle		●							●																●					●				●						
Shell			●	●	●											●																								
Swissair													●			●												●												
3M	●																	●	●	●		●	●				●					●								
U.S. Mint	●														●				●		●			●	●						●		●							
Uniroyal-Goodrich	●							●																						●			●							
Warner Bros.	●	●			●								●						●		●	●			●		●	●								●				
Wemer & Mertz															●				●	●		●																		
Wrigley																●															●		●	●		●	●		●	
Wyse	●	●														●			●								●			●	●									

*Non-equity affiliation Source: Grey Advertising

(Continued from Page 80)

income of $204.9 million in 1988, up 35.7%. Non-U.S. billings hit $1.4 billion, up 40%.

Worldwide gross income reached $432.8 million while billings hit $2.9 billion, both up 17.2%.

Grey has 168 offices in 32 countries outside the U.S.

Major accounts won in 1988 include Corning (France, West Germany, Italy, Spain, Sweden, U.K.); Blendax (Austria, Belgium, Germany); Wyse Technology (France, Hong Kong, Germany, U.K.); Warner Bros. (Philippines, Venezuela); Kohler (Canada, Japan); Armor-All (Japan, Taiwan); Nike (Hong Kong); Remington (Japan); Bristol-Myers (Mexico); Bayer (Netherlands, France).

Losses included Mobil (Austria); Bodum Design (Denmark); Le Clip (France, Spain, Switzerland); Wrangler (Hong Kong); Dunkin' Donuts (Malaysia, Taiwan); Bank of London (Uruguay). □

LINTAS:WORLDWIDE

Clients:	The Americas: U.S.*	Canada	Argentina	Brazil	Caribbean*	Chile	Colombia	Mexico	Europe: Austria	Belgium	Denmark	Finland	France	Germany	Greece	Italy	Netherlands	Norway	Portugal	Spain	Sweden	Switzerland	Turkey	U.K.	Africa**	Pacific: Australia	Hong Kong	India	Indonesia	Japan	Malaysia	New Zealand	Pakistan	Philippines	Singapore	Taiwan	Thailand
Alitalia																										●	●	●						●				
Amour de Moss	■			●				●															●										●					
BAT								●				●		●				●										●			●							
Bela						●																			●		●	●			●					●		
Bayer			●	●					●	●				●		●	●		●	●			●							●			●					
Bridgestone/Firestone	●	●														●				●			●			●												
Chefaro				●					●	●	●	●	●	●	●	●	●	●			●	●	●													●		
Citicorp															●				●											●		●				●		
Citizen																●				●																		
Coca-Cola	●	●												●			●				●			●		●				●						●			●	
Corning				●									●	●		●						●	●															
Eastern Airlines	●				●		●																●																
Heineken												●						●						●						●								
Honda	●													●											●					●						●		
IBM	●					●																														●		
ICI		●																										●		●	●	●	●	●	●	●		
Inter-Continental	●						●	●						●	●		●				●					●	●		●	●		●						
Japan Air Lines											●		●	●				●				●	●															
Johnson & Johnson	●			●										●	■				●	●	●	●	●		●		●		●		●							●	
Matchbox												●		●		●	●					●																
Minolta									●	●	●	●		●		●	●	●	●		●	●																
Molnlycke										●	●	●					●	●			●																	
NEC		●					●				●			●	●			●				●					●	●					●					
Nestle	●	●				●				●			●	●						●	●		●	●														
Novo Enzymes	●			●							●		●	●				●			●		●							●								
Nowell	●	●											●																			●	●		●	●			
Philips		●		●			●	●	●	●		●	●																		●			●	●	●	●		
Quaker Oats		●												●																	●		●				●		
RCA Columbia	●								●				●	●		●					●												●						
Reckitt & Colman		●		●										●																	●							
Remy Martin														●	●					●			●															
RJR Nabisco	●																														●	●		●	●			●	
Rowntree									●	●	●	●	●	●	●	●	●	●	●												●							●	
Seb Tefal	●								●	●			●	●		●																						
Scan. Tobacco											●	●	●		●				●																			
Shell			●														●															●			●			
Sterling Drug	●		●	●		●		●		●	●	●	●					●	●	●			●		●					●	●		●	●		●	●	
UDG														●					●				●		●							●						
Unilever	●	●	●	●		●	●	●		●	●	●	●	●	●	●	●	●	●	●	●		●		●		●	●	●	●	●	●	●	●	●	●	●	●	●
Wender																●							●					●			●		●			●	●	

*Lintas:Latina, Miami, administers the Eastern Airlines account in the Caribbean and Central America. **Africa includes Lintas offices in Cameroon, Ghana, Ivory Coast, Malawi, Namibia, Nigeria, South Africa, Zaire and Zimbabwe. Source: Lintas:Worldwide

Lintas:Worldwide

Lintas:Worldwide, New York, part of Interpublic Group of Cos., had non-U.S. gross income of $335.9 million in 1988, up 33% from 1987, and non-U.S. billings of $2.2 billion, up 29.4%.

Worldwide gross income was $537.6 million in 1988, up 28.6%, and billings were $3.6 billion, an increase of 28.6%

Lintas has 135 offices in 48 countries.

Additional assignments were gained in 1988 from Nestle (Belgium, Chile, France, West Germany, U.K., U.S.); Unilever (Australia, Belgium, Brazil, Canada, France, Germany, the Netherlands, U.K., U.S.).

Losses included Alfa Romeo (Austria); Toyota (U.K.); Unilever (South Africa); Citibank (India); Renault (Spain). □

McCANN-ERICKSON WORLDWIDE

Clients:	The Americas: USA	Canada	Argentina	Barbados	Brazil	Chile	Colombia	Costa Rica	Dom. Republic	Ecuador	El Salvador	Guatemala	Honduras	Jamaica	Mexico	Panama	Peru	Puerto Rico	Trinidad	Uruguay	Venezuela	Europe: Austria	Belgium	Denmark	Finland	France	Germany	Greece	Italy	Netherlands	Norway	Portugal	Spain	Sweden	Switzerland	Turkey	U.K.	Africa: South Africa*	Kenya	Pacific: Australia	China	Hong Kong	India*	Indonesia*	Japan	Malaysia	New Zealand	Philippines	Singapore	South Korea*	Taiwan	Thailand
American Express	●	●						●	●		●				●				●				●				●	●		●	●			●	●	●		●								●							
American Home Products	●			●	●			●			●	●	●		●		●					●							●																		●					
Bayer/Miles	●		●		●	●	●	●	●	●	●	●	●		●	●						●	●	●			●	●	●				●	●			●		●				●					●				●	
Beatrice/Hunt Wesson					●		●						●					●																																			
Black & Decker	●				●	●	●	●							●	●		●				●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●			●				●		●			●				
Bulton/Nestle			●																				●				●	●	●	●				●		●																	
Casio					●	●	●	●			●									●	●																						●			●		●				●	●
Century 21	●	●														●														●						●						●		●		●	●	●		●		
Cheesebrough-Ponds	●		●					●	●	●		●		●	●								●				●		●			●	●	●		●																●
Coca-Cola	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●			●	●	●	●	●	●	●	●	●	●	●	●	●	●
Columbia	●																												●	●																						
CPC International								●															●						●	●																							
Del Monte	●	●			●									●				●				●	●	●	●	●		●	●	●			●	●			●																
Exxon/Esso	●			●		●	●	●	●	●	●	●	●	●		●		●				●	●	●			●	●	●				●	●			●																●
General Motors	●	●	●	●	●	●	●		●	●		●			●			●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●			●	●				●									●
Gillette	●	●			●	●	●	●	●		●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●			●	●	●		●	●	●	●	●	●	●	●	●	●
Goodyear		●	●	●	●	●	●	●				●		●	●	●			●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●			●		●		●	●	●	●	●					●
Henkel				●	●									●	●						●																																
Heublein	●													●						●																																	
Hilton	●	●	●	●	●														●																																	
Intergold					●																																															
Johnson & Johnson	●	●	●	●	●			●		●	●	●	●	●	●	●	●		●		●															●			●	●	●													
Levi Strauss & Co.		●						●														●						●	●							●																	●

McCann-Erickson Worldwide

McCann-Erickson Worldwide, New York, had 1988 non-U.S. gross income of $459.8 million, up 31% from 1987. Non-U.S. billings were $3.1 billion, up 34.5%.

Worldwide gross income totaled $656.8 million, up 28.2%, and billings were $4.4 billion, up 28.2%.

McCann, composed of 144 agencies in 67 countries including the U.S., holds 100% equity

(Continued on Page 84)

McCANN-ERICKSON WORLDWIDE

Clients:	The Americas: USA	Canada	Argentina	Barbados	Brazil	Chile	Colombia	Costa Rica	Dom. Republic	Ecuador	El Salvador	Guatemala	Honduras	Jamaica	Mexico	Panama	Peru	Puerto Rico	Trinidad	Uruguay	Venezuela	Europe: Austria	Belgium	Denmark	Finland	France	Germany	Greece	Italy	Netherlands	Norway	Portugal	Spain	Sweden	Switzerland	Turkey	U.K.	South Africa*	Kenya	Pacific: Australia	China	Hong Kong	India*	Indonesia*	Japan	Malaysia	New Zealand	Philippines	Singapore	South Korea*	Taiwan	Thailand
L'Oreal	●		●	●	●	●	●	●		●	●	●		●	●		●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●			●	●			●	●		●		●		●	●
Lockheed	●				●										●																																						
Lufthansa	●	●	●		●		●	●		●	●				●		●	●			●						●		●									●		●					●							
Martini & Rossi	●			●	●	●	●	●											●	●		●	●	●		●	●		●	●		●	●		●		●														●
McDonald's	●				●										●															●				●																	
Mennen	●	●		●		●		●	●	●		●	●						●		●																															
Nestle	●	●	●		●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●		●	●		●	●	●	●	●	●	●	●	●	●	●
Quaker					●			●	●								●																																				
Richardson-Vicks					●						●					●	●	●			●																																
RJR Nabisco	●	●			●						●					●		●	●		●		●	●					●		●		●	●			●			●	●	●									
R.J. Reynolds	●			●	●	●					●					●	●	●			●		●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●								●	●
Sony	●				●																									●				●																	
Tambrands/Tampax				●																			●	●		●	●	●	●	●	●				●																	
Texas Instruments	●	●	●		●												●				●		●		●																										
Unilever	●	●			●										●	●					●		●	●	●	●	●	●		●			●	●		●		●												
Union Carbide								●						●			●																							●													
UPS																							●			●	●		●	●			●		●		●				●	●	●								●
Washington Apple Comm.	●																																																		

*Non-equity affiliation Source: McCann-Erickson Worldwide

(Continued from Page 82)
in 110 agencies, owns majority interest in five, has minority interest in four and has non-equity affiliations with 25.

Clients gained in 1988 included UPS (Belgium, France, West Germany, Italy, the Netherlands, Spain, Switzerland, U.K., Australia, Japan, Thailand, China, Philippines, South Korea, Malaysia); Agfa (Austria, Belgium, Germany, France, Italy, the Netherlands, Greece, Portugal); Europcar (Europe).

Accounts lost or resigned included Henkel (Austria, Belgium, Germany, Italy, the Netherlands, Spain, U.K., Greece); Olivetti (Austria, France, Germany, Italy, Spain, Sweden, U.K., Portugal); American Express Gold Card (U.S.). □

OGILVY & MATHER WORLDWIDE

Clients:	The Americas: USA	Canada	Argentina	Brazil	Chile	Colombia	Costa Rica*	Ecuador*	El Salvador*	Guatemala*	Honduras*	Mexico	Paraguay*	Uruguay*	Venezuela	Europe: Austria	Belgium	Denmark	Finland	France	Germany	Greece	Hungary	Ireland	Italy	Netherlands	Norway	Portugal	Spain	Sweden	Switzerland	Turkey	UK	Middle East: Bahrain*	Kenya	Saudi Arabia*	South Africa	U.A.R.*	Pacific: Australia	China	Hong Kong	India	Indonesia*	Malaysia*	New Zealand	Pakistan*	Philippines	Singapore	South Korea	Taiwan	Thailand
AGA			●	●															●	●					●	●			●	●		●																					
AT&T	●	●						●																	●							●																					
Alfred Benson																	●	●	●		●				●																													
American Express	●	●	●	●	●	●	●	●		●			●	●	●	●	●	●	●	●	●		●	●	●	●		●	●	●	●	●	●			●			●	●	●	●	●	●	●	●	●	●	●	●	●	●
BAT	●		●	●	●	●		●		●	●	●		●		●									●	●		●				●			●		●															
BTA	●	●														●	●	●	●	●	●				●	●	●	●		●		●								●		●			●	●			●		●	
Beecham	●	●		●				●				●				●			●						●	●	●	●	●			●			●																	
Boehringer-Ingelheim			●			●													●	●					●																										
Boeing	●											●								●					●			●			●																					
Bulgari	●																			●					●					●		●																				
Burroughs Wellcome	●															●				●					●							●																				
California Prune Board																			●						●						●																					
CPC International																					●											●																				
Ciba-Geigy	●	●		●											●					●																																
Compaq	●	●				●	●								●		●	●		●	●				●	●	●		●		●	●	●								●	●					●				
Cotton Council Inc.	●																			●					●							●																			●	●
Dunlop																					●															●																●
Duracell	●	●														●					●															●																
Ford Motor Co.	●														●	●	●	●	●	●	●				●	●	●	●	●	●	●	●	●								●										
Galileo	●																		●		●																															
General Electric		●																								●																									
Gillette	■																																		●																
Guinness																	●			●	●				●	●			●	●			●																			
H.B. Fuller							●			●	●	●																																								
Hallmark							●									●																																				
Harris 3-M	●															●	●	●		●	●	●			●	●	●	●	●	●	●		●																			
Hyatt International	●																																																		
ICI																					●	●																													●	
Johnson & Johnson		●						●								●																																			●	●
KAL	●																			●	●				●					●																					●	●
Kimberly-Clark	●	●					●	●		●	●	●	●				●			●	●				●	●																									●	●
Kraft General Foods	●	●	●	●					●		●		●			●		●		●	●	●			●									●	●	●				●	●	●								●	●
Lufthansa				●											●	●				●																															●	
Marks & Spencer	●																					●														●																
Mattel	●	●							●				●			●				●	●				●	●		●	●				●			●	●			●	●	●								●	
Nestle (Rowntree)		●			●															●		●			●	●						●				●				●											
Northern Feather Ltd.																		●							●					●																				
Nutrasweet	●	●	●	●		●					●							●	●	●					●				●	●							●				●										
Olivetti																●	●	●	●	●	●	●			●	●	●	●	●	●	●	●																●			
Parker Pen																																																			
PepsiCo	●		●																	●					●																										
Pfizer	●																					●																													
Philips			●	●					●				●	●	●	●	●	●	●	●	●				●	●	●	●	●	●	●	●								●	●	●	●	●	●				●	●
Polaroid	●		●	●	●	●	●	●	●	●		●		●	●	●	●	●	●	●	●		●	●	●	●	●	●	●	●	●	●		●						●										
Quaker Oats		●		●																																														
Reckitt & Colman																										●																										
Rhone Poulenc		●																●																																
Robeco																			●		●																														
Rolex																											●																								
S.C. Johnson									●										●								●																								
Seagram	●	●		●			●	●				●		●	●		●			●								●																								
Sears	●	●				●						●																																							
Shell	●	●	●	●	●	●						●	●			●	●		●	●	●		●		●	●	●	●			●																				
Siemens				●													●	●																																		
Squibb Ltd.		●																				●																													
Unilever	●	●	●	●	●	●	●	●	●	●		●		●	●	●	●	●	●	●	●		●	●	●	●	●		●	●	●				●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
United Technologies	●			●																																														
Warner Lambert								●							●																																				
Washington State Apple Comm.	●																			●								●																							
World Wildlife Fund	●	●	●													●	●	●		●	●				●					●																					●
Zahnradfabrik Friedrichshafen																			●																															

*Non-equity affiliation Source: Ogilvy & Mather Worldwide

Ogilvy & Mather Worldwide

Ogilvy & Mather Worldwide, New York, part of WPP Group, in 1988 had non-U.S. gross income of $354.1 million, up 32.6%. Non-U.S. billings reached $2.2 billion, up 15.6% from 1987.

Worldwide gross income reached $635.2 million, up 12.7%, while worldwide billings hit $4.1 billion, up 12.2%.

The network has 275 offices in 51 countries, including 226 offices outside the U.S. Ogilvy Group was purchased by London-based WPP in 1989.

Key accounts won in 1988 included Microsoft (U.S.); Thompson Medical (U.S.); WDL Bank (West Germany); Continental Tires (Germany); Tandem (U.S.); NutraSweet Co.'s Simplesse (U.S.); Midas (Canada); Remco (U.S.).

O&M also gained additional assignments from Ford (Venezuela, Portugal, U.S., U.K.); Unilever (Germany, Switzerland, U.K.); Nestle (Australia, U.S., New Zealand, U.K.); BAT (Brazil, U.K.); Hershey (U.S.); General Foods (U.S.); Sears (U.S.).

Accounts lost included Schering (U.S.); Scottish Amicable (U.K.); Mattel Hot Wheels (U.S.); Hallmark (U.S.); Volvo (Norway); Milk Marketing Board (U.K.). □

SAATCHI & SAATCHI ADVERTISING WORLDWIDE

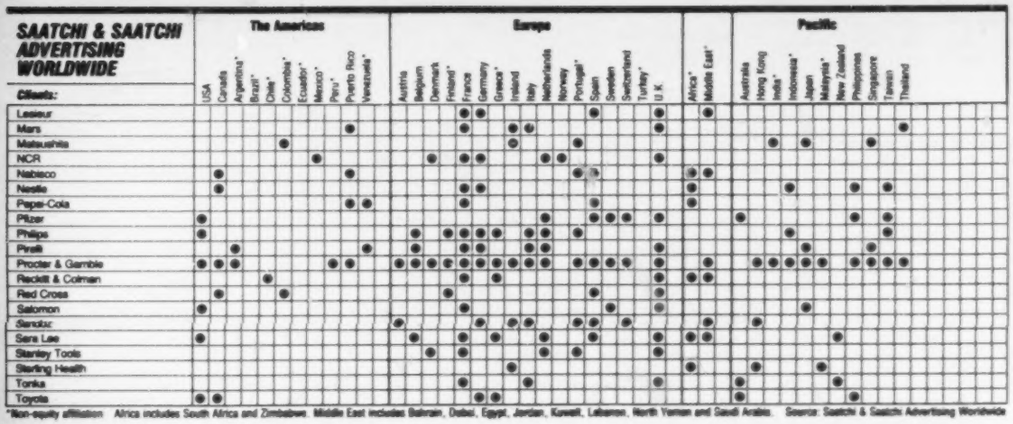
Clients:	The Americas: USA	Canada	Argentina*	Brazil*	Chile*	Colombia*	Ecuador*	Mexico*	Peru*	Puerto Rico	Venezuela*	Europe: Austria	Belgium	Denmark*	Finland*	France	Germany	Greece*	Ireland	Italy	Netherlands	Norway	Portugal*	Spain	Sweden	Switzerland	Turkey*	U.K.	Africa*	Middle East*	Pacific: Australia	Hong Kong	India*	Indonesia*	Japan	Malaysia*	New Zealand	Philippines	Singapore	Taiwan	Thailand
ABB (Asea Brown Boveri)															●											●	●	●															
Allied Lyons												●	●					●	●		●							●				●											
Avis															●	●				●								●															
Beecham															●	●		●		●								●			●												
Bongrain																●	●				●							●															
British Airways		●		●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●		●	●		●		●	●	●	●	●	●	●	
BP																												●			●	●		●		●						
BSN Gervais-Danone								●				●	●			●	●		●						●			●														
Cadbury Schweppes											●								●									●								●						
Campbell Soup	●																				●					●		●														
Canon												●		●		●		●	●	●		●					●															
Carlsberg													●		●			●										●														
CPC International	●		●			●										●	●	●										●														
DHL					●	●				●	●		●		●		●			●			●	●				●		●		●		●	●		●				
Dow Chemical			●											●		●																	●		●							
DuPont	●														●	●							●					●														
Electrolux														●			●			●				●				●														
Gallaher																●	●	●							●			●			●											
Gillette												●	●	●	●	●	●		●	●	●	●		●		●		●		●												
Grand Met	●								●						●				●											●												
Guinness									●										●			●								●		●										
Hewlett-Packard	●					●						●			●	●		●	●			●	●			●	●															
Hilton International	●									●	●			●																												
Honeywell													●							●						●		●			●											
ICI	●												●		●	●		●			●						●						●									
Jamba		●										●	●	●		●	●			●						●							●									
Johnson & Johnson	●	●				●	●	●		●		●	●			●	●	●	●			●				●	●						●									
LA Gear	●															●	●	●		●	●		●				●														

Saatchi & Saatchi Advertising Worldwide

Saatchi & Saatchi Advertising Worldwide, London, had non-U.S. gross income of $414.2 million in 1988, a 13.3% increase from 1987. Non-U.S. billings rose 16.7% to $2.8 billion.

Worldwide gross income was $740 million, up

(Continued on Page 85)



*Non-equity affiliation Africa includes South Africa and Zimbabwe. Middle East includes Bahrain, Dubai, Egypt, Jordan, Kuwait, Lebanon, North Yemen and Saudi Arabia. Source: Saatchi & Saatchi Advertising Worldwide

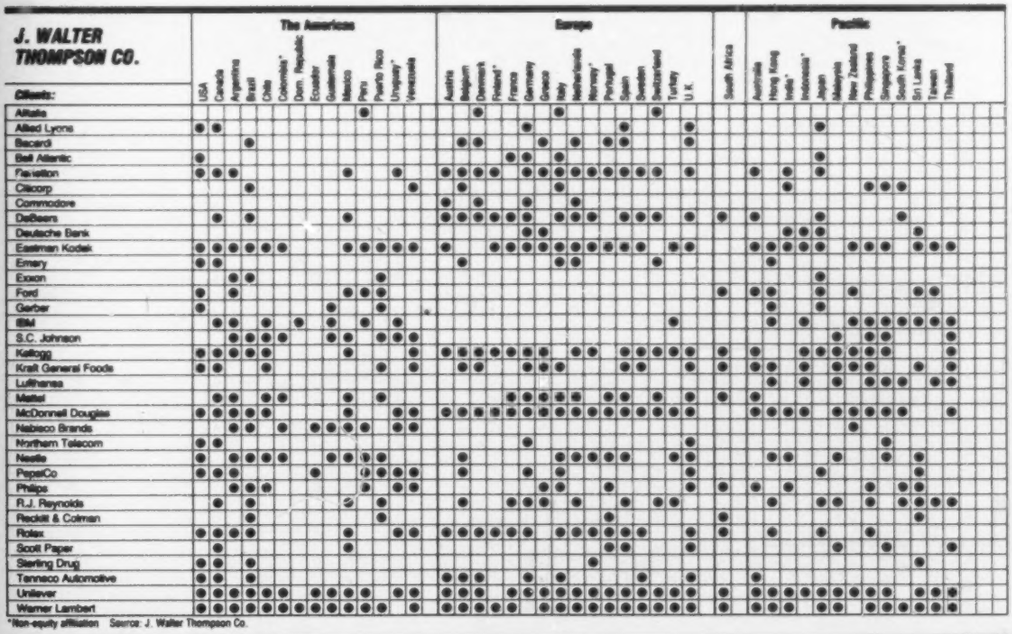
(Continued from Page 84)

8.1%, while billings were $5.1 billion, up 10.7%.

The agency operates 138 offices in 61 countries. It owns majority or maximum-allowable stock in 84 agencies, minority interest in one and has non-equity affiliations in 53.

Saatchi's account gains in 1988 included Johnson & Johnson Sanpro (Europe); Gillette personal care (Europe); Salomon Ski (worldwide); Procter & Gamble (Japan); Hewlett-Packard (Europe); General Mills (U.S.); Tyson Foods (U.S.); Sara Lee (Europe); Toyota (Philippines, Australia).

Losses included Nabisco (U.S., Europe). □



*Non-equity affiliation Source: J. Walter Thompson Co.

J. Walter Thompson Co.

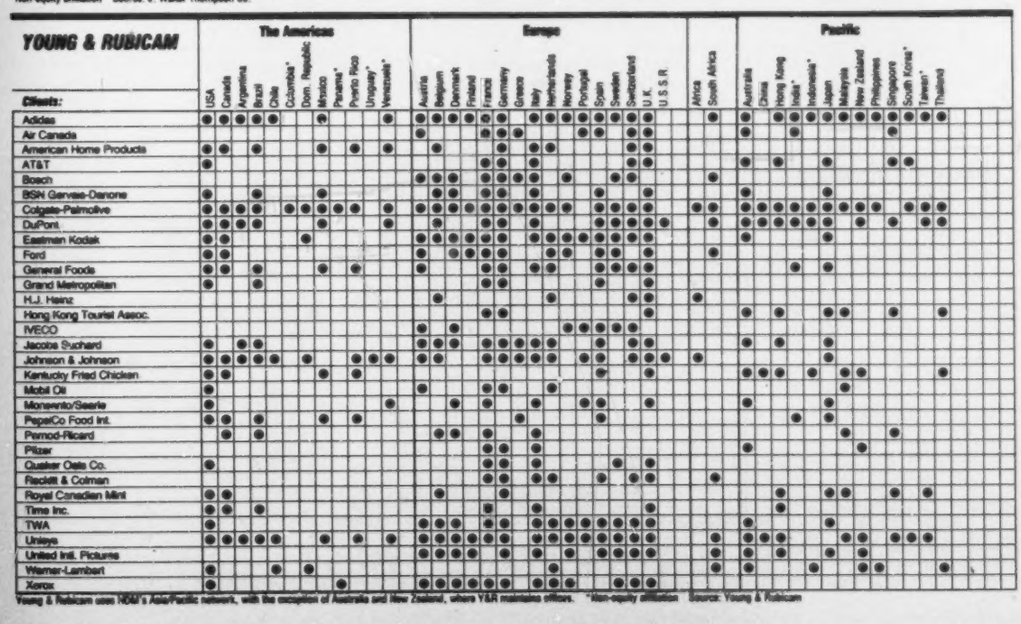
J. Walter Thompson Co., New York, part of WPP Group, had non-U.S. gross income of $301.8 million in 1988, up 25%. Non-U.S. billings rose to $2.1 billion, up 31%.

Worldwide gross income was $559.3 million, up 14.7%, while worldwide billings were $3.8 billion, up 18.6%.

JWT has 176 offices worldwide in 44 countries and owns the majority in 29 countries and minority in nine and has six affiliations.

In 1988, accounts gained included Ford (Australia, Taiwan, New Zealand); Alitalia (Italy, Switzerland); ITV (U.K.); Royal Mail (U.K.); Kellogg (Spain, Denmark); Statoil (Sweden); Chesebrough-Pond's (Mexico, Canada); Sydney Ross (Brazil); Abastible (Chile); Mattel (Canada, Colombia); Carling O'Keefe (Canada); Hewlett-Packard (Australia); Exxon (Japan); R.J. Reynolds (Philippines).

Accounts lost included Jacobs Suchard (Europe); Pepsi (Spain, Portugal, Brazil, Chile, Hong Kong, Philippines); British Rail (U.K.); Ralston Purina (Canada); Bowater/Sancella (Australia). □



Young & Rubicam uses HDM's Asia/Pacific network, with the exception of Australia and New Zealand, where Y&R maintains offices. *Non-equity affiliation Source: Young & Rubicam

Young & Rubicam

Young & Rubicam, New York, had non-U.S. gross income of $384.8 million in 1988, an increase of 10% over 1987. Non-U.S. billings rose 13% to $2.6 billion.

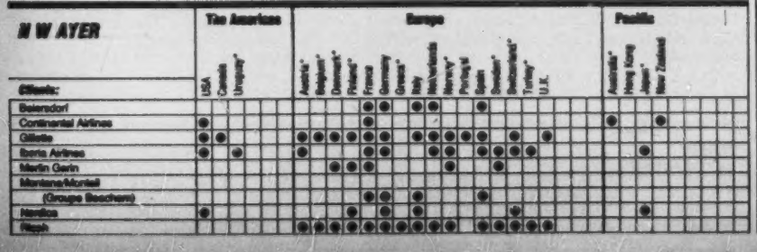
Worldwide gross income was $757.6 million, a 3% rise, while worldwide billings were up 9.9% to $5.4 billion.

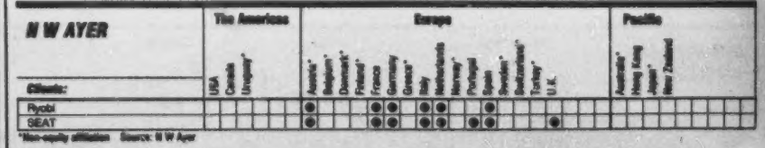
The agency has 127 offices in 44 countries outside the U.S. Y&R is sole owner of 95 agencies and has majority interest in 23 shops and minority interest in nine. The company owns 100% of Burson-Marsteller and has minority holdings in HDM, a joint venture with Dentsu and Eurocom.

Accounts gained by Y&R in 1988 include: United International Pictures and International Distillers & Vintners (both pan-European); House of Fraser (U.K.); Pernod Ricard, Reckitt & Colman, Wedgwood china (all France); General Foods (Spain); Siber Hegner watches, Bosch (both Switzerland); Johnson & Johnson (Chile, Brazil); Loctite, Valmet tractors (both Brazil); Bayer (Mexico); Frito-Lay (Puerto Rico); Labatt (Canada); Solomon's carpets (Australia); Giant Supermarket (New Zealand).

Losses included Vicuna and Imbrateur (Brazil) and Uniroyal (Mexico). □

AGENCIES WITH FEWER THAN 36 OFFICES OVERSEAS





*Non-equity affiliation Source: N W Ayer

N W Ayer, New York, had non-U.S. gross income of $57.4 million in 1988, up 15% from 1987. Non-U.S. billings rose 18% to $401 million.

Worldwide, Ayer reached $185.2 million in gross income, up 11.5%. Billings were up 10.7% to $1.3 billion. The agency has offices

(Continued on Page 86)

(Continued from Page 85)
in 33 countries, including the U.S.

Ayer holds the majority or maximum-allowable interest in six offices, minority ownership in six agencies and non-equity affiliations with 21.

Accounts gained included SEAT, Beiersdorf, Ryobi and Groupe Beecham (all pan-European) and Ritter (West Germany).

Ayer lost Bahlsen in Germany, Benckiser in the U.K. and Bang & Olufsen in France. □

BDDP

Clients:	USA*	Europe: Austria*	Belgium	Denmark*	France	Germany	Italy	Netherlands*	Norway	Spain	Sweden*	Switzerland*	U.K.	Africa	Pacific: Hong Kong	Japan*	Singapore
BSN Gervais-Danone		●		●		●			●				●				
Exxon Chemical		●		●	●			●					●				
Hasbro		●		●	●	●		●		●			●				
Korean Air		●		●	●	●		●				●	●				
Michelin		●	●	●	●		●		●	●	●	●	●	●			
Pierre Fabre		●		●		●							●				
Polaroid		●		●	●	●	●		●	●	●	●	●				
Rodier		●		●	●	●			●			●	●				
Tag Heuer Watches	●	●		●	●	●			●			●	●		●	●	●

*Non-equity affiliation Source: BDDP

BDDP Group, Paris, had 1988 worldwide gross income of $69 million, up 53.3%, while worldwide billings reached $462 million, up 55%. BDDP has no U.S. holdings.

Major gains in 1988 outside France included Korean Air, Polaroid and Tag Heuer watches. Within France, BDDP won Pier 1 Imports and France Loto.

In France, BDDP lost Printemps department store.

BDDP recently acquired Bernard & du Payrat, and Opera, both Paris. Mark Line, a sales promotion company, was acquired in Spain. □

BOZELL

Clients:	USA	Canada	Mexico	Puerto Rico	Europe: Austria	Belgium	Denmark*	France	Germany	Greece/Middle East	Italy	Netherlands	Portugal	Spain	Sweden*	Switzerland*	U.K.	Pacific: Australia	Hong Kong	Japan	Malaysia	Singapore	Taiwan
Elizabeth Arden	●	●					●	●			●						●		●				
Chrysler	●		●	●	●	●		●	●		●	●		●	●	●			●			●	
Faberge	●							●		●	●						●		●				
Merrill Lynch	●	●		●	●				●								●	●	●	●			
Patek Philippe	●							●	●	●	●					●	●		●	●	●		
Sunkist																			●		●	●	●
Texas Instruments	●	●				●			●	●		●	●	●	●		●						

Greece/Middle East indicates that Bozell administers business in Kuwait and Lebanon from its Athens office. *Non-equity affiliation Source: Bozell

Bozell, New York, had 1988 non-U.S. gross income of $28.9 million, up 9.9%. Non-U.S. billings reached $193 million, up 10.3%.

Worldwide gross income was $179.2 million and worldwide billings totaled $1.3 billion, both down 3.2%.

The agency has 45 offices in 38 countries outside the U.S.

In 1988, Bozell's account gains included Chrysler (Austria, France, the Netherlands, Norway, Switzerland, Japan); Elizabeth Arden (Canada, Denmark, U.K., Japan); L'Oreal (France, Portugal).

Loses included Weight Watchers (Austria); Volvo (Portugal); Bulgari (Switzerland); Revlon (Japan); Nestle (Sri Lanka). □

CHIAT/DAY/MOJO

Clients:	USA	Canada	Europe: France*	Germany*	Greece*	Italy*	Sweden*	Switzerland*	U.K.	UAE*	Pacific: Australia	Fiji*	Hong Kong	Japan*	Malaysia*	New Zealand	Singapore	Taiwan*	Thailand*
Australian Tourist Commission	●								●		●						●		●
Bond Brewing	●								●		●				●				
Koala Springs	●	●											●	●					
Meadow Lea Foods											●	●	●			●		●	
Mitsubishi Electric	●								●		●			●			●		●
Qantas	●		●	●	●	●	●	●	●	●	●	●	●	●	●	●	●		●
Reckitt & Colman									●		●						●	●	

*Non-equity affiliation Source: Chiat/Day/Mojo

Chiat/Day/Mojo, Venice, Calif., officially merged in July 1989. Gross income worldwide for Mojo MDA Group was $72 million in 1988, up 35.8% from 1987. Billings rose 30.7% to $455 million.

The Mojo figures include those of Mattingly, which has been sold in a separate deal to HDM.

Non-U.S. gross income for Mojo in 1988 was $61 million on billings $381.4 million.

Chiat/Day/Mojo owns one office in Canada, one in the U.K., four in Australia and one each in Hong Kong, Singapore and New Zealand. The agency owns 100% of 12 offices and has affiliations in six Asia/Pacific countries.

Accounts won in 1989 included American Express Gold Card (U.S.); Eveready Energizer (U.S.); Esprit de Corps (U.S.); S.C. Johnson (Canada); Beef & Lamb Bureau (New Zealand); Metro Stores (Singapore); Koala Springs (Hong Kong, Canada); Dell Computer (U.K.); Glad Products (Australia); Toyota (Australia); Wellcome (Australia); Shell Autocare (Australia); Qantas (Europe).

Accounts lost during 1989 include Revelations shoes (U.S.); Kresta blinds (Australia); Wang Computer (Australia); Australian Wool Corp. (Australia). □

CHUO SENKO ADVERTISING

Clients:	Pacific: Hong Kong	Indonesia	Japan	Malaysia	Singapore	Thailand
Hitachi	●		●		●	●
Honda		●	●	●	●	●

Source: Chuo Senko Advertising

Chuo Senko Advertising, Tokyo, had 1988 worldwide gross income of $47 million, up 27%. Worldwide billings reached $346 million, up 28.6%.

Along with its offices in Japan, the agency owns 49% of a Thai agency, 100% of a Hong Kong agency, 66% of a Singapore shop and 26% of a Malaysian agency. □

DDB NEEDHAM WORLDWIDE

Clients:	The Americas: USA	Canada	Argentina*	Mexico	Peru*	Venezuela*	Europe: Austria	Belgium	Finland*	France	Germany	Greece	Italy	Netherlands	Portugal	Spain	Sweden	Switzerland	U.K.	Pacific: Australia	Hong Kong	Japan	Malaysia	New Zealand	Singapore	Taiwan	Thailand
Citicorp														●							●	●		●			
Hasbro								●		●																	
Heinz	●										●										●						
Henkel								●		●	●	●		●		●											
Jacobs Suchard								●		●	●	●				●		●	●			●					
S.C. Johnson							●	●		●	●	●	●	●		●		●	●		●	●					
Knorr								●						●	●			●	●								
McDonald's	●			●						●											●			●		●	●
Michelin	●																				●	●				●	
Mitsubishi																	●				●	●					●
Mobil	●		●	●	●	●	●		●	●	●	●	●	●	●	●		●	●		●			●		●	
PepsiCo	●															●					●						
Porsche		●						●		●						●											
Seagram	●							●		●	●				●	●	●	●				●	●		●	●	●	
Spanish Tourist Office							●			●							●	●									
Volkswagen	●	●		●				●		●	●			●	●	●			●		●						

*Non-equity affiliation Source: DDB Needham Worldwide

DDB Needham Worldwide, New York, had non-U.S. gross income of $155.5 million in 1988, up 10.3% from 1987. Non-U.S. billings were $1.1 billion, up 13.4%.

Worldwide gross income was $399.9 million, up 8.5%, while worldwide billings reached $3 billion, up 13.1%.

The agency operates in 46 offices in 22 countries outside the U.S. It owns majority or maximum-allowable stock in 20 agencies, minority interest in 10 and has non-equity affiliations in six.

Accounts gained between Jan. 1, 1988, and May 31, 1989, included Unilever (Australia); Mobil (Austria, Taiwan); American Airlines (Belgium, Sweden); Royal Trust (Canada); Douwe Egberts (France); Jacobs Suchard (Belgium, West Germany, Greece, Japan); S.C. Johnson (Greece, Switzerland); Communications Services Ltd. (Hong Kong); Hong Kong Telephone (Hong Kong); Seagram Martell (Hong Kong, Italy, Japan, Belgium, France, Taiwan, Germany, the Netherlands, Singapore, U.K.); Cadbury Schweppes (New Zealand, Australia); Audi (Spain); Spanish Tourist Board (U.K.); Sandoz (Germany); Michelin (Japan, Taiwan, Hong Kong); McDonald's (Mexico); Henkel (Germany, Belgium, Spain, Netherlands).

Accounts lost or resigned by DDB Needham during the same period included Ford (Australia, New Zealand); Sara Lee (Australia); Blendax (Austria, Belgium); Levi's (Canada); Delsey (Belgium, France, Germany); Knorr Elorza (Spain). □

HAKUHODO

Clients:	USA	Brazil*	Europe: France	Germany	Netherlands	U.K.*	Pacific: Australia*	Japan	Hong Kong*	New Zealand	Singapore	Thailand	Malaysia
Ajinomoto	●	●					●				●	●	
Bridgestone	●					●	●			●	●		
Canon				●			●	●		●		●	
Citizen	●	●		●		●	●	●				●	
JAL						●	●			●		●	
Jusco							●	●			●	●	
KAO							●			●	●	●	
Konica	●			●			●			●			
NEC	●			●	●	●	●	●	●				
Toshiba	●			●			●	●				●	

*Non-equity affiliation Source: Advertising Age

Hakuhodo, Tokyo, had non-U.S. gross income of $517 million in 1988, up 36%. Non-U.S. billings were $3.9 billion, up 39.3%.

Worldwide gross income rose 36.3% to $522 million, while billings reached $3.9 billion, up 36%.

Hakuhodo owns 100% of its offices in the U.S., West Germany, the Netherlands, Singapore, Hong Kong, the U.K., France, Italy and Brazil; 60% of its office in Taiwan; and 49% of offices in Malaysia and Thailand.

The agency has representative offices in Barcelona and Beijing.

In addition, Hakuhodo owns 50% of Hakuhodo:Lintas and 49% of McCann-Erickson Hakuhodo. □

HDM

Clients:	USA	Europe: Austria	Belgium	Denmark	France	Germany	Italy	Netherlands	Portugal	Spain	Sweden	Switzerland	Turkey	U.K.	Pacific: China	Hong Kong	India	Indonesia	Japan	Malaysia	Philippines	Singapore	South Korea	Taiwan	Thailand
Adidas																●	●	●	●	●	●			●	●
BSN Gervais Danone	●		●		●	●	●			●		●		●					●						
Chanel						●	●	●	●		●														
Credit Suisse			●	●		●	●	●	●	●	●	●	●	●											
Colgate-Palmolive	●															●	●	●	●	●	●	●		●	●
Damart			●	●		●			●																
DuPont						●							●			●	●	●	●	●			●	●	●
Flying Tigers	●													●		●	●			●			●	●	●
Hewlett-Packard Intl.	●		●			●					●		●			●									
Henkel			●	●	●	●	●	●		●	●			●											
Hong Kong Tourist Assn.																●	●			●	●	●			●
Israeli Government Tourism			●	●		●	●	●	●	●	●		●												
Jacobs Suchard			●			●				●		●					●		●						
JAL																●	●			●	●	●		●	
Kentucky Fried Chicken	●															●	●		●		●			●	
L'Oreal				●		●		●									●								
Royal Canadian Mint																	●			●	●		●		●
Pernod Ricard				●			●	●			●		●							●		●			
Peugeot	●		●	●		●	●	●		●	●	●		●											
3M			●	●	●	●	●	●	●	●	●	●	●	●											
Unisys																●	●			●		●	●	●	

Source: HDM

HDM had 1988 non-U.S. gross income of $250.4 million, up 41.8%. Non-U.S. billings reached $1.7 billion, up 41.7%.

Worldwide gross income hit $279 million, up 36.8%, while worldwide billings reached $1.9 billion, up 40%.

HDM, a joint venture among Tokyo-based Dentsu; Young & Rubicam, New York; and Havas, Paris, has 81 offices in 27 countries.

Gains for HDM in 1988 included 3M (Austria, Belgium, France, West Germany, Italy, Spain, Switzerland, U.K.); Henkel (Belgium, France); NEC (Spain, Germany); Kentucky Fried Chicken (China, Malaysia, Thailand).

Losses in 1988 included Credit Demande (Belgium); Maison du Cafe (France); Bisquit Cognac and International Wool Secretariat (Germany); Kortman (the Netherlands); Grundig and Spall (Portugal); Grundig and Mahou beer (Spain); Hewlett-Packard (Switzerland); Langdale Timeshare and Harvey Nichols (U.K.); Esso (Singapore). □

LOWE INTERNATIONAL

Clients:	USA	Can	Europe: Austria	Belgium	Denmark	France	Germany	Italy	Netherlands	Spain	Sweden	Switzerland	U.K.
AC Delco			●	●			●					●	

LOWE INTERNATIONAL

Clients:	USA	Canada	Europe: Austria*	Belgium*	Denmark*	France	Germany	Italy	Netherlands	Norway*	Spain	Sweden*	Switzerland*	U.K.
Avis			●	●	●	●	●	●	●	●	●	●	●	●
Bols			●	●	●	●	●	●	●	●	●	●	●	●
Coca-Cola	●			●			●							
General Motors			●	●			●	●	●					●
Henkel		●	●	●			●	●	●		●			
Interbrew			●	●	●	●	●	●	●	●	●	●	●	●
Parker Pen	●	●		●			●	●	●		●			●
G.D. Searle		●	●					●	●					

*Non-equity affiliation Source: Lowe International

Lowe Howard-Spink & Bell, London, holding company for Lowe International, had 1988 worldwide gross income of $197 million, up 11.4%. Worldwide billings jumped 27% to $1.3 billion.

These results included Lowe's 100% holding of Laurence, Charles, Free & Lawson, 30% holding in Lowe Marschalk and 18% in Lowe Tucker Metcalf, all in the U.S.

In 1988, Lowe International won pan-European accounts from Avis; Interbrew; Bols; Henkel.

Other gains included Parker Pen (Canada, Spain); Bristol-Myers (Italy, West Germany); Richards & Wrench, Samsung, Brother (Australia); Drout Insurance, Eternit (Belgium); Hagenuk, Ferrero Rocher, Underberg Better and AOK, the state health insurance (Germany); Imperial Tobacco, KP Crisps, British Rail, Sky Television, Reebok, Tesco, National Power Co. (U.K.).

Accounts lost included Konica (Australia); Spa soft drinks/mineral water (Belgium); Gilbey's (Canada); Krups (France); Horten (Germany); Debenhams (U.K.). □

ROUX, SEGUELA, CAYZAC & GOUDARD

Clients:	Europe: Austria	Belgium	France	Germany	Italy	Netherlands	Spain	Sweden	Switzerland	U.K.	Morocco	Saudi Arabia
Bel			●			●					●	
Cartier	●	●	●	●	●	●			●	●	●	
Citroen	●	●	●	●	●	●	●	●	●	●	●	
Club Mediterranee	●	●	●	●	●		●	●	●	●		
Jacobs Suchard	●		●	●					●			
Piaget			●	●	●		●		●	●		

Source: Roux, Seguela, Cayzac & Goudard

Roux, Seguela, Cayzac & Goudard, Paris, had 1988 non-U.S. gross income of $184 million, up 60.3%, and non-U.S. billings of $1.3 billion, up 57.7%.

Worldwide gross income reached $210 million, up 81%, and billings hit $1.5 billion, up 84%.

RSCG owns majority interest in agencies in 11 European countries, a network of 40 regional French agencies, and agencies in Martinique, Guadeloupe and Morocco.

In 1988, RSCG won worldwide accounts for Guerlain perfume, Piaget watches, Stouffer Foods and Barclays Bank. Losses for the agency included Fisher-Price (France). □

SCALI, McCABE, SLOVES

Clients:	USA	Canada	Mexico	Australia
Hertz	●	●	●	●

Source: Scali, McCabe, Sloves

Scali, McCabe, Sloves, New York, had 1988 non-U.S. gross income of $35.2 million, up 51% from 1987. Non-U.S. billings were $210.9 million, up 44%.

Worldwide gross income hit $107 million, up 14.9%; worldwide billings reached $770.6 million, up 18%.

The agency has 12 foreign offices in eight countries and owns majority or maximum allowable stock in 10 agencies and minority interest in one.

International accounts won included Knorr (Canada); Best Foods (Canada); Jaguar/Rover (Australia); Computer Plus (Australia); Australian Labor Party (Australia); Ramdisk (Australia); Mobiltronics (Australia); Pillsbury (Mexico); Champion (Mexico); Moenus (West Germany); Sopexa (Germany); Dow Chemical (Germany); Penn (France); Lever Bros. (Spain).

International accounts lost included Canada Airlines (Canada); Moulinex (Mexico); Hattori (Germany); Henkel (Germany); Phillip Morris (Germany); Xerox (France); Sanbitter (France); ComputerLand (Spain); Gillette (Spain). □

TBWA ADVERTISING

Clients:	USA	Europe: Austria*	Belgium*	Denmark*	France	Germany	Greece*	Italy	Netherlands	Norway*	Portugal*	Spain	Sweden*	Switzerland	Turkey*	U.K.	Japan*
Absolut Vodka	●				●	●	●					●				●	
Aerolinas Argentinas					●	●			●			●					
Air Plus	●	●	●	●	●	●	●	●	●	●	●	●	●	●		●	
Barilla			●		●	●	●					●	●	●		●	
Beiersdorf			●		●	●		●	●			●	●	●			
Bull Computers		●	●	●	●	●			●	●	●	●	●				
Delsey	●	●	●	●	●	●	●	●	●	●	●	●	●	●		●	
Evian	●								●			●				●	
Fromageries Bel	●				●	●										●	
Goldstar	●					●								●		●	
Grand Met-IDV	●								●			●				●	
Henos		●	●		●	●			●			●		●			
Henkel		●	●	●	●	●			●			●		●			
Monsanto	●				●	●			●								
Philip Morris		●			●	●			●								
Tsirumo			●		●	●			●					●			●

*Non-equity affiliation Source: TBWA Advertising

TBWA, New York, had 1988 non-U.S. gross income of $74.3 million, up 33.4%, and non-U.S. billings were $517.8 million, a 23.6% increase.

Worldwide gross income hit $97.4 million, up 30.6%, while worldwide billings reached $671.9 million, up 23.3%.

TBWA has 17 offices in 10 countries, all majority-owned. The agency has non-equity affiliation in seven countries.

Outside the U.S., TBWA won business from Delsey, Beiersdorf, Henkel, Evian, Aerolinas Argentinas, Absolut and BSN Foods. Losses included SEAT (Europe). □

UNIVAS

Clients:	Europe: Austria*	Belgium*	Denmark*	France	Germany*	Italy	Netherlands*	Norway*	Portugal*	Spain	Switzerland*	U.K.	Middle East*
Lee Cooper		●		●	●							●	
L'Oreal		●		●	●	●	●		●	●	●	●	●
Ralph Lauren clothing	●	●		●	●								
Renault trucks	●	●	●	●	●	●	●	●	●	●	●		
Vanderbilt		●		●	●	●	●		●			●	●

*Non-equity affiliation Middle East includes Lebanon, Egypt, United Arab Emirates, Kuwait and Jordan Source: Univas

Univas, Paris, a wholly owned subsidiary of French agency group Eurocom, reported worldwide gross income in 1988 of $36.5 million, an 11.5% increase over 1987. Worldwide billings rose 11.3% to $243.7 million.

Univas has 20 offices in 15 countries and owns majority or maximum allowable interest in six offices, minority interest in four and has affiliations in 10. The agency has no U.S. holdings.

In France, Univas wins included France Loisirs, WellPolo Textiles, Smirnoff, Usines Center, Vogelsang France, Plasto, Even and industrial promotion for Finland.

Univas account gains outside France included Nintendo, Kraft, MFI Hygena/-Schreiber (U.K.); Kaliseand (Spain); Pernod Ricard's Orangina; Select Interim (Belgium). □

WCRS WORLDWIDE

Clients:	The Americas: USA	Argentina*	Brazil*	Chile*	Mexico*	Peru*	Uruguay*	Venezuela*	Europe: Austria*	Belgium*	Denmark*	France	Germany*	Italy	Netherlands	Norway*	Portugal*	Spain	Sweden*	Switzerland*	U.K.	Saudi Arabia*	Pacific: Australia	Hong Kong	Malaysia	New Zealand	Singapore	Taiwan	Thailand
BAT																				●			●	●		●		●
Bayer	●																							●	●			●
BMW																		●		●			●		●			
BP												●		●						●				●				
Canon														●						●							●	●
Fiat Tipo									●			●	●	●	●	●		●	●									
Hong Kong Shanghai Bank														●									●	●			●	●
ICI												●								●				●				●
S.C. Johnson									●			●		●			●											
Maple Leaf									●				●		●	●	●	●										
Matsushita (Panasonic)												●		●						●			●					
Nestle	●											●		●	●								●					
Pan Am	●	●	●	●	●	●	●	●	●	●		●		●	●	●	●	●	●	●		●						
Parker Pen																							●	●	●		●	●
Sara Lee									●					●						●			●					
Seagram																							●		●		●	
Singapore Tourist Promotion Board																						●		●	●		●	
Sheraton																							●	●		●	●	●
Unilever													●	●		●				●			●					
United Distillers									●	●	●	●	●	●			●	●	●	●								

*Non-equity affiliation Source: WCRS Worldwide

WCRS Worldwide, London, had non-U.S. gross income of $190.2 million in 1988, an increase of 39% from 1987. Non-U.S. billings rose 31% to $1.26 billion.

Worldwide gross income hit $290 million, up 20.8%, while billings jumped 21.1% to $2 billion.

WCRS has 19 agencies in 13 countries.

Accounts won in 1988 included Allied Lyons (U.S., the Netherlands); Monsanto (U.S., Thailand); Lego (U.K., France, Italy); Hayes Microcomputer (U.S., U.K.); Dunlop (France, Malaysia).

In the first six months of 1989, WCRS won Pan Am (worldwide); United Distillers (Europe); Unilever (U.K., Australia, West Germany, the Netherlands); Maple Leaf (Europe); Parker Pens (Asia).

Losses included 3M (U.K.); Sheraton (U.S., Europe); Laura Ashley (U.K., Australia, U.S.); Remy Martin (Asia); Qantas (Europe); Stouffer's (U.S.). □

AGENCY/CLIENT SUMMARY

Clients:	Agencies: N W Ayer	BBDO Worldwide	BDDP	Backer Spielvogel Bates Worldwide	Bozell	Leo Burnett Co.	Chiat/Day-Mojo	DDB Needham Worldwide	D'Arcy Masius Benton & Bowles	FCB/Publicis	Grey Advertising	Hakuhodo	HDM	Lintas: Worldwide	Lowe International	McCann-Erickson Worldwide	Ogilvy & Mather Worldwide	Roux, Seguela, Cayzac & Goudard	Saatchi & Saatchi Advertising	TBWA Advertising	J. Walter Thompson Co.	Univas	WCRS Worldwide	Young & Rubicam Inc.
American Express																●	●							
BAT				●								●			●		●						●	
Bayer		●						●	●			●			●		●						●	
Beecham	●											●							●					
Beiersdorf	●					●														●				
Bristol-Myers								●	●			●												
BSN Gervais-Danone			●											●					●				●	
Cadbury Schweppes								●		●									●					
Campbell Soup		●								●									●					
Canon													●	●					●				●	
Ciba Geigy				●						●		●												
Citicorp								●		●				●							●			
Coca-Cola Co.														●	●	●								
Colgate-Palmolive Co.										●				●									●	
CPC International		●								●							●	●	●				●	
Du Pont		●												●					●				●	
Eastman Kodak Co.																					●		●	
Ford																		●			●		●	
General Motors										●						●	●							
Gillette Co.	●	●															●	●						
Grand Metropolitan										●	●								●	●			●	
H.J. Heinz						●				●	●												●	
Henkel		●								●				●		●	●							
IBM													●		●						●			
ICI											●				●			●				●		
Jacobs Suchard										●				●					●	●			●	
Johnson & Johnson		●													●			●					●	
S.C. Johnson & Son		●								●									●			●		
Kimberly-Clark										●	●								●					
Kraft General Foods							●						●						●		●	●	●	
Mars					●					●			●											
McDonald's							●			●							●							
Nestle		●					●								●				●		●			
Parker Pen																●	●					●		
PepsiCo		●					●			●									●		●			
N.V. Philips		●						●	●	●				●		●	●		●					
Polaroid		●	●														●							
Procter & Gamble							●			●									●					
Quaker Oats Co.														●		●	●						●	
Reckitt & Colman										●				●			●		●				●	
Richardson Vicks								●						●			●							
RJR Nabisco									●					●			●		●					
Rowntree		●												●			●							
Seagram		●						●						●			●				●			
Shell												●												
3M				●									●											
Unilever		●												●		●	●				●	●		
United Distillers						●			●															
Warner-Lambert Co.				●														●			●		●	
Xerox		●																●					●	

Source: Advertising Age

Wine totals show little to celebrate

By John C. Maxwell Jr.

Significant sales declines in imports and wine coolers last year helped push down total wine industry volume sales 3% to 561.4 million gallons.

Imports dropped almost 16% to 81 million gallons and now account for 14.4% of the total wine market, down from 16.6%. Wine coolers dropped 15.5% to about 96.7 million gallons.

In the coming year, it's expected the domestic wine market will remain fairly stable, with decreases in the wine cooler segment offset by growth in the premium segment. Imports will probably keep declining, but at a more moderate pace. As a result, the overall wine market is likely to remain flat or decline slightly by 1% or 2%.

Mr. Maxwell is with Wheat First Securities, Richmond, Va.

Domestic wine sales volume last year remained relatively stable at 480.4 million gallons, only a 0.4% decline. Special natural wines, though a relatively small segment (4.6% of the domestic market in 1988), declined 13.7% to 22.3 million gallons. Sources indicated sparkling wines are off about 3.0% in 1988, with premium California wines witnessing significant volume growth of 18.0%.

The premium segment's growth was primarily responsible for the overall domestic wine market's stability. This growth is partially attributable to holiday sales as consumers seemed to move upscale when buying wine as a gift.

It appears premium-price wines were increasingly bought for gifts and entertaining, while lower-price wines were purchased for at-home consumption, leaving more mid-price wines on the retail shelves.

A breakdown of domestic wine shows both white and red wines lost market share in 1988 to rose. White now has a 69.1% share and red a 13.9% share, while rose increased to a market share of 17.0%. But in the premium segment, reds are believed to have a larger share.

Imported wines were under pressure particularly from California wines, which have been priced below imports for several years.

Industry experts indicate premium wine prices have increased 15% to 20% in 1989, partially due to higher grape prices and to the lack of any significant increases in the last couple of years. While no increases are forecast for other segments of the wine market, the premium increases could aid the pressured import market.

It appears per-capita wine consumption reached its peak in 1985 at 2.42 gallons and has been declining since then. Last year's per-capita consumption declined 4.2% to 2.27 gallons. □

Sales and shares of U.S. wines and coolers

Figures estimated in millions of gallons

Rank 1988	Rank 1987	Company	1986 Amount	1986 Share	1987 Amount	1987 Share	1988 Amount	1988 Share	1987-88 Change
1	1	E&J Gallo	166.8	28.7%	173.7	30.0%	160.5	28.6%	(7.6)
2	2	Vintners Int'l.	62.0	10.7	63.0	10.9	62.0	11.0	(1.6)
3	3	Canandaigua*	37.4	6.4	37.5	6.5	35.8	6.4	(4.5)
4	4	Heublein	20.3	3.5	28.4	4.9	34.5	6.1	21.5
5	7	Franzia	18.6	3.2	16.3	2.8	25.5	4.5	56.4
6	5	Almaden	24.3	4.2	22.4	3.9	20.0	3.6	(10.7)
7	6	Guild	11.9	2.0	17.1	3.0	13.7	2.4	(19.9)
8	8	Monarch**	13.5	2.3	13.0	2.2	12.5	2.2	(3.8)
9	9	Sebastiani	5.2	0.9	8.8	1.5	10.5	1.9	19.3
10	15	Glumarra	1.2	0.2	4.9	0.8	7.5	1.3	53.1
11	12	Beringer	4.8	0.8	6.0	1.0	6.9	1.2	15.0
12	14	Robert Mondavi	4.1	0.7	5.3	0.9	6.0	1.1	13.2
13	10	Bronco	3.3	0.6	8.7	1.5	5.7	1.0	(34.5)
14	13	Lamont	5.1	0.9	5.5	1.0	5.3	0.9	(3.6)
15	11	California Growers	2.0	0.3	8.5	1.5	3.7	0.7	(56.5)
16	18	Delicato	2.2	0.4	3.0	0.5	3.5	0.6	16.7
17	16	Mogen David	3.5	0.6	3.5	0.6	3.3	0.6	(5.7)
18	17	F. Korbel	2.7	0.5	3.1	0.5	3.0	0.5	(3.2)
19	20	ISC	1.8	0.3	2.8	0.5	2.8	0.5	0.0
20	19	Christian Bros.***	2.8	0.5	2.8	0.5	2.6	0.5	(7.1)
21	22	Gibson	2.7	0.5	2.4	0.4	2.5	0.4	4.2
22	21	C. Mondavi	2.5	0.4	2.6	0.4	2.4	0.4	(7.7)
23	28	Sonoma	0.8	0.1	0.8	0.1	1.3	0.2	62.5
24	23	Weibel	1.5	0.3	1.2	0.2	1.2	0.2	0.0
25	25	M&H	0.6	0.1	1.0	0.2	0.9	0.2	(10.0)
26	30	East-Side	0.4	0.1	0.7	0.1	0.9	0.2	28.6
27	24	San Martin	1.2	0.2	1.0	0.2	0.8	0.1	(20.0)
28	26	Mirassou	0.9	0.2	1.0	0.2	0.7	0.1	(30.0)
29	27	Wente	1.0	0.2	0.8	0.1	0.7	0.1	(12.5)
30	29	Sierra Wines	0.9	0.2	0.7	0.1	0.4	0.1	(42.9)
31	31	Louis Martini	0.6	0.1	0.6	0.1	0.4	0.1	(33.3)
		Subtotal	406.6	69.9%	447.1	77.3%	437.5	77.9%	(2.1)
		Other domestic	66.0	11.4	35.2	6.1	42.9	7.6	21.9
		Total domestic	472.6	81.3%	482.3	83.4%	480.4	85.6%	(0.4)
		Imports	108.7	18.7	96.3	16.6	81.0	14.4	(15.9)
		Total	**581.3**	**100.0%**	**578.6**	**100.0%**	**561.4**	**100.0%**	**(3.0)**

*In fiscal 1987 Canandaigua completed the acquisitions of Widmer's Wine Cellars and Monarch Wine Co., including its Maniscewitz brand. **In 1987 Canandaigua acquired Monarch. ***Heublein announced the acquisition of Christian Brothers in May 1989. *Source:* John C. Maxwell Jr.

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Honey board abuzz with seal

By Janet Meyers

The National Honey Board's new seal of approval—a bear guzzling honey from a jar—next week will start appearing on packages of reformulated Honey Graham Chex cereal.

The board joins other commodity groups that have developed logos as a marketing tool and symbol of ingredient purity.

The honey logo has also been approved for use on 24 other unidentified products, ranging from breads to salad dressings.

Ralston Purina Co., which recently reformulated its Honey Graham Chex to double the honey content, will use the seal on packages and in coupons.

The marketer found the honey bear particularly attractive for use in the active honey-added segment of ready-to-eat cereals, where sales in the past year increased 93%, said a Ralston spokesman.

"Our honey bear logo is reserved for products using honey as a key sweetener," said Mary Humann, honey board director of public relations.

For products to qualify, honey must be the main sweetener, but the necessary ratio of honey varies by food type, she said.

The board will advertise the bear logo for the first time early next year with ads encouraging consumers to look for the bear mark, Ms. Humann said. Evans/-Kraft, Seattle, will create the $1 million-to-$2 million campaign.

The board hopes to give an edge to those products with a significant amount of honey as an ingredient over those that use "honey" in their products' names but contain minimal amounts of the ingredient, Ms. Humann said. She said companies won't pay for using the bear seal.

The board and General Mills late last month broke a free standing insert for Betty Crocker muffins, encouraging consumers to spread honey on their muffins. The FSI, created by Evans/Kraft, also featured a promotion for a stuffed honey bear.

"People love the taste of honey, but they don't know how to use it," Ms. Humann said. "We've had to educate them." □

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